USDA-NASS

Montana Crop & Livestock Reporter

survey results summary issued twice monthly by the

Montana Agricultural Statistics Service

~~Issue: 04-23 (0279-0394)   Released: December 10, 2004~~

"Happy Holidays from All of Us at Montana Agricultural Statistics Service"

May your holiday season be filled with joyfulness and precipitation! Timely rains throughout 2004 have improved Montana's agricultural production outlook by putting a dent in the persistent drought Montana has suffered for more than five years. Wheat production in Montana grew by 31 million bushels due to increases in spring and durum wheat production. Montana's 2004 spring wheat production went up 22 percent from the 2003 crop; durum wheat production rose 24 percent; and barley production jumped 44 percent. In 2004, value-added agricultural opportunities improved with the scheduled spring 2005 completion of the malt barley plant in Great Falls. The plant will require 16 million bushels of malt grade barley annually, which is 1.2 million bushels more malt barley than Montana producers sold in 2003.

Montanans have a lot to be thankful for, but Montana's people are what is truly remarkable about Montana. Montana's farmers and ranchers continue to be stewards of the land, working tirelessly to provide for future generations. Because of the remarkable people who make a living from the land, Montana Agricultural Statistics Service is also hopeful about the future of Montana agriculture.

To everyone involved in Montana's agricultural industry, thank you for your continued support. With your help, we can provide sound statistical facts that you can use to chart the future course of **Montana's Number One Industry--Agriculture**.

Curt Lund, the deputy director for Montana Agricultural Statistics Service, has decided to retire after 37 years of service - of which 17 years were spent in Montana. Curt's devoted service to agriculture shone in the outstanding job he did for Montana's agricultural industry. He will truly be missed in our office.

We sincerely hope that you and your family have a joyous and safe holiday season.

Sincerely,
Peggy Stringer
Director

2004 Dry Edible Bean Production

Production for Montana's **dry edible bean** crop was estimated at 272,000 cwt., up 17 percent from the 2003 crop. Planted acreage for 2004 is estimated to be 13,000 acres, unchanged from last year. Harvested area for 2004 is 12,800 acres, unchanged from 2003. The yield is forecast, at 2,130 pounds per acre, 310 pounds better than last year.

Pinto bean production for Montana is estimated at 244,000 cwt, which is 17 percent more than last year. Acres planted, at 10,800, are up 11 percent from 2003. Harvested acres, at 10,600, are 9 percent higher than the previous year. The yield is forecast at 2,300 pounds per acre, 150 pounds more than last year.

All chickpea (garbanzo beans) production is forecast at 28,000 cwt for 2004, up 27 percent from 2003. Planted acreage was set at 2,200 acres, down 31 percent from 2003. Harvested area is estimated, at 2,200 acres, down 27 percent from 2003. The yield is forecast, at 1,270 pounds per acre, 540 pounds above 2003. **Small Chickpea** (smaller than 20/64 in.) production is forecast at 4,000 cwt. for 2004. Planted acreage was set at 500 acres. Harvested area is estimated at 500 acres. The yield is forecast at 800 pounds per acre. **Large Chickpea** (larger than 20/64 in.) production is forecast at 24,000 cwt. for 2004. Planted acreage was set at 1,700 acres. Harvested area is estimated at 1,700 acres. The yield is forecast at 1,410 pounds per acre .

U.S. **dry edible bean** production is forecast at 18.1 million cwt for 2004, down 3 percent from the October forecast and 19 percent below last year. Harvested acreage is forecast at 1.23 million acres, 2 percent below the last forecast and down 9 percent from 2003. The average U.S. yield is forecast at 1,479 pounds per acre, a decrease of 16 pounds from the October forecast and 191 pounds below a year ago. Production is below a year ago in 12 of the 18 producing States. Most notable is a 39 percent production decrease from last year in both Minnesota and North Dakota where an early frost in mid-August severely damaged the crop. Production is down from a year ago for large lima, baby lima, navy, great northern, pinto, light red kidney, dark red kidney, pink, and blackeye. Production increased from last year for small white, small red, cranberry, black, and small and large chickpeas.

Idaho production is expected to be 9 percent above the previous year at 1.64 million cwt. Wet weather this fall delayed harvest for some farmers. Colorado production, at 1.27 million cwt, is an increase of 9 percent from 2003. Growing conditions in Colorado were good for irrigated acreages but dryland beans were stressed by lack of moisture. Production in South Dakota increased 23 percent, Montana 17 percent, and Washington 16 percent.

ERS Economist Says Beef Production Pushed Up By Weights

Sharply reduced fed cattle slaughter from a year earlier and prospects for the best wheat grazing in years have resulted in a gain in stocker/feeder cattle supplies outside feedlots. Through the first three-quarters of this year net feedlot placements were nearly 9 percent below a year earlier. Cattle Feedlot breakevens moved up to the low $90s per cwt and are expected to remain in this range through the winter quarter. Yearling feeder cattle prices for marketings in October through February are ranging from $113 to $117 per cwt, even with lower feed costs, breakevens have continued to rise since mid summer. Packer spreads also remain lower, with the third quarter spread averaging 31.2 cents a pound, down from 43.4 cents a year earlier. Retail prices for Choice beef peaked at midyear at $4.17 a pound, and have been declining through early fall. The wholesale-retail spread remains wide, averaging $2 a pound in the third quarter, up from $1.50 a year earlier when beef supplies were very tight. The slow fed cattle marketing pace is resulting in heavier steer/heifer slaughter weights adding to already large total meat supplies. Beef production this fall through the first half of 2005 is expected to average above a year earlier, even with sharply reduced cow slaughter. Larger supplies of beef and competing meats are expected to result in per capita meat consumption near to above year-earlier levels through 2005.

Stocker/feeder cattle supplies outside feedlots on October 1 were up from a year ago, with most weight groups remaining at or near record prices. Many of these cattle will be grazed this winter and begin to come off pasture in early February through March, bolstering feedlot placements and 2005 beef production.

U.S. Livestock and Meat Imports and Exports

	2002	2003	Jan-Sept 2003	Jan-Sept. 2004
Beef and veal imports		**carcass wt. 1,000 lbs.**		
Australia	1,136,758	1,128,589	828,079	779,612
New Zealand	603,931	644,607	551,906	577,241
Canada	1,090,894	740,065	460,578	783,416
Brazil	200,785	206,227	153,026	155,102
Argentina	85,349	87,890	58,668	840,080
Central America	68,325	79,118	55,493	64,610
Uruguay	14,095	103,372	49,926	282,707
Mexico	16,707	15,883	11,188	14,048
Other	756	161	148	499
Total	3,217,599	3,005,910	2,170,011	2,741,315
Beef and veal Exports				
Japan	771,074	918,014	698,629	8,521
Canada	240,550	226,681	184,484	29,933
Mexico	629,252	586,390	471,071	212,934
South Korea	597,301	586,617	445,423	979
Caribbean	23,015	21,691	15,491	18,631
Other	186,513	178,856	125,507	21,614
Total	2,447,704	2,518,249	1,940,605	292,612
Cattle imports		**head**		
Mexico	816,460	1,239,531	673,582	903,551
Canada	1,686,508	512,353	508,322	2,981
Over 700 lbs.	1,259,536	439,016	439,016	--
Immediate slaughter	1,024,378	354,044	354,044	--
440-700 lbs.	221,782	12,520	11,500	903
Total	2,502,973	1,751,896	1,181,916	906,532
Cattle exports				
Mexico	106,019	22,437	16,402	719
Canada	134,220	68,394	59,091	25,110
Total	244,394	98,818	81,958	25,898

U.S. Livestock and Meat Imports and Exports

	2002	2003	Jan-Sept. 2003	Jan-Sept 2004
Lamb imports		**carcass wt. 1,000 lbs.**		
Australia	68,073	75,320	53,193	59,991
New Zealand	48,565	59,159	45,435	51,494
Total	117,047	134,830	98,872	111,983
Mutton Imports				
Total	42,886	32,912	20,330	30,705
Lamband mutton exports				
Total	7,101	6,596	4,930	5,521
Pork imports				
Canada	879,949	971,328	724,156	669,402
Denmark	123,013	147,110	113,108	108,792
Other	67,675	66,763	51,260	51,856
Total	1,070,727	1,185,202	888,523	830,050
Pork exports				
Japan	775,945	793,339	624,437	681,151
Canada	188,351	191,505	130,814	165,276
Mexico	313,695	349,983	228,868	380,712
Russia	41,397	16,386	11,928	31,761
South Korea	70,836	79,642	62,960	45,515
Hong Kong	28,393	44,620	28,264	25,398
China (Mainland)	23,803	44,658	32,676	56,062
China (Taiwan)	50,758	70,129	44,676	760,893
Other	119,051	110,436	90,976	92,671
Total	1,612,228	1,716,698	1,255,600	1,555,438
Hog imports		**head**		
Canada	5,740,073	7,438,063	5,278,179	6,428,690
Under 110 lb	3,757,882	4,971,044	3,639,967	4,337,292
Total	5,740,675	7,438,254	5,278,370	6,429,236
Hog Exports				
Total	205,121	169,881	89,483	139,992

SOURCE: Livestock, Dairy and Poultry Situation and Outlook, ERS, November 23, 2004.

October Ag Prices Received

October full month crop prices were mixed compared with October 2003 and September 2004. The average price for Montana's winter wheat, at $3.39 per bushel, was down $0.16 from a year ago, but up $0.17 from September 2004; spring wheat moved up $0.17 from last year and $0.13 from last month to $3.77 per bushel; durum wheat prices were $0.03 higher than October 2003, but $0.05 lower than September 2004 to $4.03 per bushel. Feed barley prices fell $0.50 from the previous year and $0.04 from the previous month to $1.57, malt barley prices also dropped $0.23 from a year ago and $0.28 from September 2004 to average $2.99 per bushel.

The mid-November price for alfalfa hay was unchanged from October 2004 at $78.00 per ton, but all other hay dropped $1.00 from October to $69.00 per ton. The mid-November grain prices were mostly higher from the previous month with the winter wheat price averaging $3.47 per bushel; spring wheat was $4.01; durum wheat was $3.77; all barley was $2.64; feed barley averaged $1.70; and malt barley averaged $2.97 per bushel.

Livestock prices for the full month of October were mostly lower compared with September 2004. Steer and heifer prices jumped $6.00 to $115.00 per cwt., but cows dropped $3.80 to $51.20. The average price for calves decreased $1.00 to $127.00 per cwt. Sheep prices dropped $1.00 to $40.70 per cwt, and lamb prices also dropped $1.00 to $109.00 per cwt. The all milk price, at $14.90 per cwt., was down $0.30 per cwt. from September. Steer and heifer prices for mid-November averaged $112.00 per cwt.; cows averaged $49.10 per cwt.; calves averaged $126.00 per cwt.; and milk prices averaged $15.70 per cwt.

Nationally, October prices and changes from October 2003 and September 2004 were as follows: winter wheat was $3.34, down $0.03 from last year, but up $0.08 from September; spring wheat averaged $3.51, down $0.02 from last year, but up $0.03 from last month; durum wheat was $3.89, unchanged from last year, but down $0.01 from September; the all barley price was $2.29, down $0.45 from last year and down $0.14 from September; and steer and heifer prices averaged $91.00, down $6.80 from last year, but up $1.70 per cwt. from September.

The U.S. mid-November winter wheat price was $3.39 per bushel; spring wheat was $3.62 per bushel; durum wheat was $3.75 per bushel; all wheat was $3.51 per bushel, malt barley was $2.78 per bushel; feed barley was $1.75 per bushel; and all barley was $2.42. Steer and heifer prices were $89.10 per cwt.; cow prices were $48.60, calves were $124.00 per cwt.; all hog prices were $55.30 per cwt; and all egg price was $0.612 per dozen.

The preliminary All Farm Products Index of Prices Received by Farmers in November, at 114, based on 1990-92=100, is 1 point above October. The Crop Index remained unchanged from October while the Livestock Index increased 1 point (0.9 percent). Producers received higher commodity prices for tomatoes, eggs, hogs, strawberries, and grapes. Lower prices were received for lettuce, oranges, soybeans, corn, and cattle. The seasonal change in the mix of commodities farmers sell, based on the past 3-year average, also affects the overall index. Increased average marketings of dairy, cattle, and cotton offset decreased marketings of soybeans, peanuts, and potatoes. The preliminary All Farm Products Index is down 2 points (1.7 percent) from November 2003. The Food Commodities Index increased 3 points (2.6 percent) from last month to 120. The index is unchanged from November 2003.

United States Index Summary

INDEX (1990-92=100)	October 2003	November 2003	October 2004	November 2004
Prices Received	113	116	113	114
Prices Paid, Interest, Taxes, & Farm Wage Rages 1/	129	129	135	134
Ratio 2/	88	90	84	85

1/ Prices paid indexes (1990-92=100) published monthly. 2/ Ratio of index of prices received by farmers to index of prices paid.

Montana Average Farm Prices Received

Commodity	UNIT	Monthly Average				Change From Previous		Mid-Month Average	
		Montana			U.S.	Month	Year	Montana	U.S.
		Oct. 2003	Sept. 2004	Oct. 2004	Oct. 2004	Sept. 2004	Oct. 2003	Nov. 15, 2004	Nov. 15, 2004
		Dollars							
Winter Wheat	Bu.	3.55	3.22	3.39	3.34	+0.17	-0.16	3.47	3.39
Durum Wheat	Bu.	4.00	4.08	4.03	3.89	+0.05	+0.03	3.77	3.75
Spring Wheat	Bu.	3.60	3.64	3.77	3.51	+0.13	+0.17	4.01	3.62
All Wheat	Bu.	3.61	3.57	3.67	3.44	+0.10	+0.06	3.83	3.51
Barley, All	Bu.	2.68	2.93	2.62	2.29	-0.31	-0.06	2.64	2.42
Feed Barley	Bu.	2.04	1.61	1.57	1.57	-0.04	-0.50	1.70	1.75
Malt Barley	Bu.	3.22	3.27	2.99	2.74	-0.28	-0.23	2.97	2.78
Oats	Bu.	N/A	1.76	N/A	1.45	N/A	N/A	N/A	1.36
Alfalfa Hay	Ton	77.00	79.00	78.00	97.80	-1.00	+1.00	78.00	94.00
All Other Hay	Ton	71.00	71.00	70.00	68.60	-1.00	-1.00	69.00	67.80
All Hay Baled	Ton	75.00	77.00	75.00	89.80	-2.00	NC	76.00	86.20
Steers & Heifers	Cwt	93.20	109.00	115.00	91.00	+6.00	+18.80	112.00	89.10
Cows	Cwt	49.60	55.00	51.20	49.90	-3.80	+1.60	49.10	48.60
Beef Cattle 1/	Cwt	90.60	93.90	104.00	86.10	+10.10	+13.40	93.80	84.20
Calves	Cwt	107.00	128.00	127.00	126.00	-1.00	+20.00	126.00	124.00
Sheep 2/	Cwt	35.70	41.70	40.70	40.70	-1.00	+5.00	N/A	N/A
Lambs 2/	Cwt	106.00	110.00	109.00	98.20	-1.00	+3.00	N/A	N/A
All Milk	Cwt	14.90	15.20	14.90	15.50	-0.30	NC	15.70	15.80

1/ Composite of steers, heifers, and cows. 2/ Mid-month prices for sheep and lambs discontinued.

U.S. Meats Supply and Use, 2003 and Projected 2004 and 2005

Item		Beginning Stocks	Production 1/	Imports	Total Supply	Exports	Ending Stocks	Consumption Total	Consumption Per capita 2/, 3/
				Million pounds 4/					
BEEF									
2003		691	26,339	3,006	30,036	2,519	518	26,999	64.9
2004 Proj.	Oct:	518	24,524	3,587	28,629	446	625	27,558	65.6
	Nov:	518	24,599	3,551	28,668	443	625	27,600	65.7
2005 Proj.	Oct:	625	24,601	3,660	28,886	600	575	27,711	65.3
	Nov:	625	24,876	3,660	29,161	620	575	27,966	65.9
PORK									
2003		533	19,966	1,185	21,684	1,717	532	19,435	51.8
2004 Proj.	Oct:	532	20,573	1,115	22,220	2,069	420	19,731	52.1
	Nov:	532	20,594	1,130	22,256	2,080	510	19,666	51.9
2005 Proj.	Oct:	420	20,971	1,115	22,506	2,115	460	19,931	52.1
	Nov:	510	20,821	1,215	22,546	2,115	520	19,911	52.0
BROILERS									
2003		763	32,399	12	33,173	4,920	608	27,645	81.6
2004 Proj.	Oct:	608	33,758	24	34,391	4,357	700	29,334	85.7
	Nov:	608	33,768	28	34,405	4,507	700	29,198	85.3
2005 Proj.	Oct:	700	34,848	12	35,560	4,600	650	30,310	87.7
	Nov:	700	34,848	28	35,576	4,955	650	29,971	86.7
TURKEYS									
2003		333	5,576	2	5,911	484	354	5,074	17.4
2004 Proj.	Oct:	354	5,322	4	5,680	431	275	4,974	16.9
	Nov:	354	5,383	4	5,741	450	275	5,016	17.1
2005 Proj.	Oct:	275	5,502	4	5,781	455	300	5,026	16.9
	Nov:	275	5,502	4	5,781	510	300	4,971	16.7

1/ Total including farm production for red meats and, for poultry, federally inspected plus non-federally inspected, less condemnations. 2/ Pounds, retail-weight basis. 3/ Population source: Dept. of Commerce, Bureau of Economic Analysis. 4/ Carcass weight for red meats and certified ready-to-cook weight for poultry.
Source: World Ag Supply and Demand Estimates, WAOB, November 12, 2004.

COMING IN NEXT REPORTER

- Potato Stocks
- Milk Production
- Cattle on Feed
- Red Meat Production
- Egg Production
- Hog & Pig Inventory

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